

PDP Providers Training Guide

January 2008

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Provider Selection

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH

Home Clinical Administrative Plan CIOB

Provider Selection

Billing Provider 5801-PDP ANTELOPE VALLEY HOSP

Service Location 5801I-PDP ANTELOPE VALLEY HOSP

CLICK

Submit

[Use previous Provider ID](#)

- Click on the **Clinical** tab and find your Provider Selection.
- Click on the down arrow to select your Billing Provider.
- Click on the down arrow to select your Service Location.
- Click on the **Submit** button to go to the Find Client screen.

Find Client

- Key in your Client's DMH ID Number and click **Search**.
- You will be taken directly to the **Episode** screen of your client.

The screenshot shows the 'Find Client' interface within the Los Angeles County Department of Mental Health system. The top navigation bar includes 'Home', 'Clinical' (highlighted), 'Administrative', 'Plan', and 'CIOB'. A user session bar displays '5801-PDP ANTELO:5801I-PDP ANTEL' and the username 'jgarciabagues'. The main heading is 'Find Client' with a help icon. On the left, an 'Options' sidebar lists: 'Return', 'Change Provider', 'Client CaseLoad', 'Client List', 'Daily Log', and 'Manage Groups'. The main area has two search methods: 'Search by ID.' (selected) and 'Search by Custom Criteria.' Under 'Search by ID.', there is a 'Type' dropdown set to 'DMH' and an 'ID' text field containing '0000000'. A callout box points to this field with the text: 'Enter the (7 digit Numeric) IS number here.' Under 'Search by Custom Criteria.', there are input fields for 'Last Name:', 'First Name:', 'Middle Initial:', 'Birth Date:', 'Or Age:', and 'Gender:'. At the bottom right, there are 'Search' and 'Clear' buttons. A callout box labeled 'CLICK' points to the 'Search' button.

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH

Home Clinical Administrative Plan CIOB

5801-PDP ANTELO:5801I-PDP ANTEL jgarciabagues

Find Client ?

Options

- Return
- Change Provider
- Client CaseLoad
- Client List
- Daily Log
- Manage Groups

☒ Search by ID.

Type: DMH ID: 0000000

☐ Search by Custom Criteria.

Last Name:

First Name:

Middle Initial:

Birth Date: Or Age:

Gender:

Enter the (7 digit Numeric) IS number here.

CLICK

Search Clear

Search by Custom Criteria

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH

Home Clinical Administrative Plan CIOB

5801-PDP ANTELO:5801I-PDP ANTEL jgarciaabagues

Find Client ?

Options

- Return
- Change Provider
- Client CaseLoad
- Client List
- Daily Log
- Manage Groups

☐ Search by ID.

Type: DMH ID:

☒ Search by Custom Criteria.

Last Name: Testme

First Name: Jillian

Middle Initial:

Birth Date: 07/12/1970 Or Age:

Gender: Female

CLICK

Search Clear

- You can also search by Custom Criteria - enter client's Last Name, First Name, Birth Date and Gender, Click **Search** when all fields are filled in.
- If your client is in the system (has been enrolled), you will be automatically taken to the **Client Episode** screen.

- If your client is not enrolled, you will be taken to **Find Client Results** screen where you can click on **Add Client** link.

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH

Home Clinical Administrative Plan CIOB

5801-PDP ANTELO;5801I-PDP ANTEL jgarciaabagues

Find Client Results

Options No records found meeting the criteria specified.

Return

Add Client

Filter Clients

Filter By:

Name

For:

Search

CLICK

- Click on the **Add Client** link to add a new client to the system.

Client Information/Process of Enrolling a New Client

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH

Home Clinical Administrative Plan CIOB

5801-PDP ANTELO:5801I-PDP ANTEL jgarciaabagues

Client Information

Client: Testme , Jillian (not enrolled) ?

Options	Identification	Contacts	Financial	Other	Groups	XRef	MCaI Benefits
Return	Name Last: Testme	First: Jillian	Middle:				
Change Provider	AKA Last:	First:	Middle:				
Find Client	SSN: 999999999	MM Name:	LOC: III-Intensive				
Daily Log	Gender: Female	DOB: 07/12/1970	Age: 37				
View Episodes	Primary Lang: 01-English	Pref Lang: 01-English					
Check Eligibility	Marital Status: 01-Single	Education: 12-Twelfth Grade					
Enroll Client	Ethnicity: 01-White	Origin:	Tribe:				
Eligibility History	Employment: FC-Full time competitive employment (salaried)						
	Handicap: 00-Not physically disabled/no significant disability						
	Living Arrngmnt: 01-Lives alone in house or apartment						
	Conservatorship:	Veteran: No					
	Date Of Death:	English Speaking: <input checked="" type="checkbox"/>					
		Cancel	Continue				

CLICK

- Enrolling a client starts here on the **Client Information** screen – **Identification** tab – you have to fill out all the required fields. *All italicized fields are required* - see Test Client.
- Ethnicity Field – if your client's ethnicity is **Hispanic**, you need to select the **Origin** by clicking in the drop down field and selecting it. Also if your client's ethnicity is **American Indian**, you need to select the **Tribe** by clicking on the drop down field.
- Click **Continue** to proceed to the **Contact** tab.

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH Home Clinical Administrative Plan CIOB

5801-PDP ANTELO:5801I-PDP AN jgarciabagues

Client Information

Client: Testme , Jillian (not enrolled)

Options

- Return
- Change Provider
- Find Client
- Daily Log
- View Episodes
- Check Eligibility
- Enroll Client
- Eligibility History

Identification **Contacts** Financial Other Groups XRef MCal Benefits

ClientAddress

Transient/Homeless ☐ Time Homeless:

Address 1: 1111 W. Test Example Street Address 2:

City: Los Angeles County: LOS ANGELES State: CA Zip: 91234

Phone: (h) (213) 111-1111 (w)

Address Memo:

Other Contacts

	Name	Type	Phone	Email	Add'l Details
+					
1					

CLICK

Cancel Continue

- **Contact** tab - (see Test Client). This is where you fill the client's contact information.
- Click on the **blue plus sign** to add contact information. See screen below.... Click **Save** to save all the data.
- Click **Continue** to proceed to the **Financial** tab.

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH Home Clinical Administrative Plan CIOB

5801-PDP ANTELO:5801I-PDP A jgarciabagues

Contact Information

Client: Testme , Jillian (not enrolled)

Options

- Return

Last Name: First: Middle:

Contact Type:

Address 1:

Address 2:

City:

State:

Zip:

Phone (Home):

Phone (Work):

Email:

DMH Id:

☐ Do not contact

CLICK

Save Cancel

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH Home Clinical Administrative Plan CIOB

5801-PDP ANTELO:5801I-PDP ANTEL jgarciabagues

Client Information

Client: Testme , Jillian (not enrolled)

Options
Return
Change Provider
Find Client
Daily Log
View Episodes
Check Eligibility
Enroll Client
Eligibility History

Identification **Contacts** **Financial** **Other** **Groups** **XRef** **MCal Benefits**
UMDAP Date: Source of Income:
Service Location: # of Dependents:
Family Income (\$): Annual Liability (\$):
Client Reported Benefits

Type	Description	ID Number
SD/Medi-cal		00000000A

1

CLICK

Cancel Continue

- Fill in all the financial information of your client.
- **Client Reported Benefits** - click on the **blue plus sign** to add benefits.
- Click on **Continue** when finished.


Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH Home Clinical Administrative Plan CIOB

5801-PDP ANTELO:5801I-PDP ANTEL jgarciabagues

Benefit Information

Client: Testme , Jillian (not enrolled)

Options
Return

Type: 
Description:
HMO/PHP:
ID Number:

Cancel Save

- Click on the drop down arrow to select the type of benefit.
- Fill in Description, ID Number, Click **Save**.

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH

Home Clinical Administrative Plan CIOB

5801-PDP ANTELO:5801I-PDP A jgarciabagues

Client Information

Client: Testme , Jillian (not enrolled)

Options

- Return
- Change Provider
- Find Client
- Daily Log
- View Episodes
- Check Eligibility
- Enroll Client
- Eligibility History

Identification **Contacts** **Financial** **Other** **Groups** **XRef** **MCal Benefits**

SFPR

☒ Provider DIRECTOR, MEDICAL-[0000025]

☐ Special Program

Birth Information

Last Name: Testme First: Jillian Middle:

County: LOS ANGELES State: CA Country: United States

Mother's First Name: Tester

Like Clients

Client ID	Client Name	DOB	SSN
1			

Save Cancel

CLICK

- The **Other** tab is where you select the SFPR and Special Program information, and the Birth Information. Once all information is entered, click on **Save**.
The system will take you back to the **Client Information Screen**.

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Home Clinical Administrative Plan CIOB

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Client Information

Client: Testme , Jillian (not enrolled)

Options

- Return
- Change Provider
- Find Client
- Daily Log
- View Episodes
- Check Eligibility
- Enroll Client
- Eligibility History

Identification **Contacts** **Financial** **Other** **Groups** **XRef** **MCal Benefits**

Name Last: Testme First: Jillian Middle:

AKA Last: First: Middle:

SSN: 999999999 MM Name: LOC: III-Intensive

Gender: Female DOB: 07/12/1970 Age: 37

Primary Lang: 01-English Pref Lang: 01-English

Marital Status: 01-Single Education: 12-Twelfth Grade

Ethnicity: 01-White

Origin: Tribe:

Employment: FC-Full time competitive employment (salaried)

Handicap: 00-Not physically disabled/no significant disability

Living Arrngmnt: 01-Lives alone in house or apartment

Conservatorship: Veteran: No

Date Of Death: English Speaking: ☒

Cancel Continue

CLICK

- Now you can click on the **Enroll Client** link under **Options** to enroll the client. The IS will generate an IS number.
- You will receive the following pop-up message:

“Client was successfully enrolled. DMHID #####”

To view a complete Click by Click manual on how to enroll a client, please click on the following link.

<http://dmh.lacounty.info/hipaa/downloads/BasicIsv3.3.pdf>

View Episodes

- Here are the **Client Episodes**.
- Under the **Options** list, click on **Open Episode** to begin to open an episode for your client. Note there are no open episodes on the **Open** tab; this will be the first episode for this client.

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Client Episodes

Client: Testme , Jillian () ?

Options

- Return
- Change Provider
- Find Client
- Client Info
- Client Case Load
- Daily Log
- Check Eligibility
- Open Episode
- Eligibility History

Open Closed

Episode	I/O	Admit Date	Diagnosis Code	Primary Contact	Last Claim			D
1								

CLICK

Open an Inpatient Episode

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Home Clinical Administrative Plan CIOB

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Open Inpatient Episode

Client: Testme , Jillian

Options Admission Diagnosis

Return

Admit Date: 1/1/2008 Procedure Code: 0100-Acute General Hospital -

Referral In Code: Other

Referral In Provider:

Intent Of Service: Improvement Services

Primary Problem Area: Mentally ill

Ward: Blue Necessity: Emergency

Patient File #:

Legal Status: Voluntary 72-hr MD inebriate.

Treatment Authorization for Minor:

Phys Disabled? No Dev Disabled? No

Dual Diagnosis?

Primary Contact: DIRECTOR, MEDICAL-[0000025]

Continue

Referral In Code is Used to determine who referred the client to your agency.

Referral In Provider
This field is optional. It can be left blank.

CLICK

- Enter the admission data for this client.
- Click **Continue** once you have completed adding the information on this screen.

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Home Clinical Administrative Plan CIOB

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Open Inpatient Episode

Client: Testme , Jillian

Options **Admission** **Diagnosis**

Return

Dx Date: 01/01/2008

AXIS I	AXIS IV	AXIS V
296.20 - Major Depressive Disor	<input checked="" type="checkbox"/> 1. Primary Support Group	GAF
	<input type="checkbox"/> 2. Social Environment	20
	<input type="checkbox"/> 3. Educational	
	<input type="checkbox"/> 4. Occupational	Primary:
	<input type="checkbox"/> 5. Housing	296.20
	<input type="checkbox"/> 6. Economic	Secondary:
	<input type="checkbox"/> 7. Access to Health Care	301.7
	<input type="checkbox"/> 8. Interaction w/ Legal System	
	<input type="checkbox"/> 9. Other Psych/Environment	
	<input type="checkbox"/> 10. Inadequate Information	

Cancel Save

CLICK

The drop down list displays the top 20 diagnosis codes.

To search for a diagnosis code not in the drop down list, click on the silver arrow.

- Click **Save** once you have completed entering the diagnosis information.

- Below is the **Client Episode** screen, showing a new Inpatient Episode for the client.

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5801-PDP ANTELO:5801I-PDP ANTEL | jgarciaabagues

Client Episodes

Client: Testme , Jillian ()

Options

- Return
- Change Provider
- Find Client
- Client Info
- Client Case Load
- Daily Log
- Check Eligibility
- Open Episode
- Eligibility History

Open **Closed**

Episode	I/O	Admit Date	Diagnosis Code	Primary Contact	Last Claim			D
5801I001	I	1/1/2008	296.20 i	DIRECTO-0000025 i	0	0		

1

This trashcan is displayed until the first service is entered in this episode.

This means that you have the opportunity to delete the episode until you enter the first service.

Once you have entered the first service, you have the option to void the service if you need to.

- Click the Episode ID to edit these episodes details, or enter services for this episode.

Closing an Inpatient Episode

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Home Clinical Administrative Plan CIOB

5801-PDP ANTELO:5801I-PDP ANTEL jgarciabagues

Inpatient Episode

Client: Testme , Jillian () ?

Options

- Return
- Find Client
- Client Info
- Check Eligibility
- Medications
- Close Episode**
- View Episodes

Search Service Date

Begin Date From

Begin Date To

Search

Services Void Services Diagnosis Admission

	Begin Date	End Date	Procedure	# Of Days	M	S	C	D
+								
1								

- Under **Options**, click on the Close Episode link to begin closing the episode.

- Doing so will take you to the **Close Inpatient Episode** screen where you begin closing your episode.

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5801-PDP ANTELO:5801I-PDP ANTEL | jgarciaabagues

Close Inpatient Episode

Client: Testme , Jillian

Options | **Discharge** | **Diagnosis**

Return

Discharge Date: 01/01/2008

Discharge Time: 1000

Referral Out Code: Private physician or medical clinic

Referral Out Provider:

Client Status: Other

Physical?

DD? No

Dual?

Continue

CLICK

- Enter the **Discharge** details.
- Click **Continue**.

Note: The discharge date can be equal to the admit and service date **ONLY** when the client is admitted, and discharged on the same date!!

But if the discharge date is greater than the admit date, then the discharge date must always be one day after the last service date.

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5801-PDP ANTELO:5801I-PDP ANTEL jgarciabagues

Close Inpatient Episode

Client: Testme , Jillian

Options **Discharge** **Diagnosis**

Return

Dx Date: 01/01/2008

AXIS I	AXIS IV	AXIS V
296.20 - Major Depressive Disor	<input checked="" type="checkbox"/> 1. Primary Support Group	GAF
	<input type="checkbox"/> 2. Social Environment	20
	<input type="checkbox"/> 3. Educational	
	<input type="checkbox"/> 4. Occupational	Primary:
	<input type="checkbox"/> 5. Housing	296.20
	<input type="checkbox"/> 6. Economic	Secondary:
	<input type="checkbox"/> 7. Access to Health Care	301.7
	<input type="checkbox"/> 8. Interaction w/ Legal System	
	<input type="checkbox"/> 9. Other Psych/Environment	
	<input type="checkbox"/> 10. Inadequate Information	

Cancel Save

CLICK

- Update the **Diagnosis** details (don't forget the date!).
- Click **Save**.

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH

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Client Episodes

Client: Testme , Jillian () ?

Options

- Return
- Change Provider
- Find Client
- Client Info
- Client Case Load
- Daily Log
- Check Eligibility
- Open Episode
- Eligibility History

Open **Closed**

Episode	I/O	Admit Date	Discharge Date	Diagnosis Code	Primary Contact	Last Claim			D
1									

Click on the closed tab to retrieve/view the episode

- Remember that the episode will no longer appear on the **Open** tab; it now appears under the **Closed** tab. See example below.

Los Angeles COUNTY DEPARTMENT OF MENTAL HEALTH

Home Clinical Administrative Plan CIOB

5801-PDP ANTELO:5801I-PDP AN jgarciaabagues

Client Episodes

Client: Testme , Jillian () ?

Options

- Return
- Change Provider
- Find Client
- Client Info
- Client Case Load
- Daily Log
- Check Eligibility
- Open Episode
- Eligibility History

Open **Closed**

Episode	I/O	Admit Date	Discharge Date	Diagnosis Code	Primary Contact	Last Claim			D
5801I001	I	1/1/2008	1/1/2008	296.20 i	DIRECTO-01		0	0	